

Planning & Restructuring Services

Planning can be comprehensive or extremely targeted, depending on the problem you need to address, like:

- Restructure and reposition to adapt to a changing environment - funding, demographic shifts, or new trends
- Launch a new program, expand your services to current clients, or extend your reach to new ones
- Absorb recent growth and position yourself to grow more
- Strengthen and diversify your revenue streams

We use the following decision-making framework to help you solve your problem:

Set Clear Goals

Conduct an **Internal Assessment** of your program, people and money to see where you are now, through:

- Financial analysis
- Board and staff surveys, interviews and focus groups
- Leadership and management structure review
- Programmatic impact

Perform an **External Assessment**, through interviews and market research surveys to learn:

- How funders, clients, and key stakeholders perceive your organization, its programmatic impact, and leadership
- How you compare with others to highlight strengths, weaknesses and best practices
- How much demand there is for a new program or service you contemplate offering

Consider Viable Options and Choose the Best One

- Identify **Decision-Making Criteria** to choose among your available options
- Create **Scenarios** to illustrate potential pathways to your goal
- Perform a **Trade-Off Analysis** to understand each option's pros and cons
- **Facilitate Discussions** so you select the option with the highest probability of success

Create a Realistic Roadmap to Align All

- **Key Actions and Timeframes**, outlining and prioritizing the necessary steps to realize your goal
- **Resources Required**, money, leadership, staff, and infrastructure
- **Organizational Changes** to clarify responsibilities and improve efficiencies for staff, board and volunteers
- **Marketing and Communications** to motivate your staff and reach your clients, funders and community
- **Financial Projections** over the period to ensure a balanced budget
- **Milestones**, near- and mid-term, and **Roles and Responsible Parties** to hold the right people accountable

Measure Progress to Make Adjustments When Needed

- Create a **Dashboard** of key indicators to evaluate if you're meeting targets in program, people, and money
- Employ a **Budget vs. Actual Report** to compare where you are now with where you planned to be
- Develop **Cash Flow Projections** to monitor your cash available to meet your operating expenses
- Use a **Fund-Raising Report** to track activities to identify, cultivate, solicit, and steward donors and funders